

June 27, 2000

MEMORANDUM

TO: ECOP/PLC

FROM: George E. Cooper
Jon Ort
ECOP/PLC Co-Chairs

SUBJECT: Comments on the proposed "Money Management" Initiative

ECOP/SPC felt that the proposed initiative was appropriate, relevant, and timely and that the concept was well presented.

Several general and specific concerns are summarized below:

1. CONCEPT

A large portion of the initiative concept was related to an extensive review of the literature, rather than to the initiative itself, including the ability of the Cooperative Extension System to focus its resources on the logistics of managing a system-led initiative. The wording of the initiative suggests also that this will be a CSREES initiative rather than an initiative of the system. While we recognize the critical and substantive role of the CSREES staff in providing national guidance to programs, the proposal should be written in a way that demonstrates how system resources are mobilized in response to this emerging issue.

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2. RESOURCE AVAILABILITY

The proposal should address the question of resources for the initiative. In many instances resource commitments from the system will come through the re-allocation of extension staff to support the proposed activities. Thus, the proposal would be strengthened considerably by the inclusion of a preliminary assessment of the anticipated personnel committed to support of the initiative. Has there been a preliminary study of individuals with interests in the initiative? Emphasis on the resource issue is important to demonstrate a system capacity to respond to emerging and intractable societal issues. This will also demonstrate to ECOP that a capacity exists to launch a credible effort around the proposed initiative. As a reminder, approval of a

new initiative does not mean that the initiative will be endorsed by ECOP to move forward as a request for new resources (i.e. a new initiative to be funded through the federal budget process).

3. LITERATURE REVIEW

While the literature review is excellent, it undergirds a rationale for the initiative based on a vision from outside of the land-grant system. The initiative proposal would be enhanced if the research knowledge base that currently exists within the Cooperative Extension System were briefly summarized and included. We envision that such a statement would highlight the fact that a strong research base is already available within the system to support the educational strategies that are being proposed.

4. RELATIONSHIP TO PREVIOUS EFFORTS

The proposal also lists a number of previous and on-going efforts of the system that are closely associated with the initiative. While these are good examples of what the system has done, the writers should convey that the proposed new initiative is not a collection of extant program experiences. The reviewers recognize the value of the "Money 2000" program in building system capacity for the proposed initiative and other efforts. However, the initiative must stand on its own merits by demonstrating that it is a coordinated and solid program, not just a combination of a number of past successful efforts.

5. INCLUSIVITY/DIVERSITY

More emphasis is needed to demonstrate that the initiative will address the needs of diverse populations, including major minority and immigrant populations. While briefly addressed in the literature review, that diverse populations will benefit from the goals of the proposed efforts is not adequately dealt with.

6. BUDGET

The budget information is not adequate for articulating the full scope of needs associated with launching and maintaining the initiative. Furthermore, the writers must demonstrate the system's unique ability to assume management of the initiative by describing the capacity that is already in place (see pages 8&9).

7. LEADERSHIP

The proposal would be strengthened if the key members of the leadership team were described in a brief synthesis narrative using the knowledge and experiences gained from similar activities that provide a basis to launch the initiative.

8. EVALUATION/OUTCOMES

An evaluation strategy is not included, and this must be conceptualized and articulated. What are the expected outcomes? How will success for the proposed initiative be determined? The proposal also lacks a description of the implications of a successful effort on the incomes of individuals, families and communities as a result of the initiative.

9. PRESENTATION

The proposal's length is too long. More of the narrative should be devoted to the initiative itself, rather than a review of literature. To condense the proposal and reduce the number of pages while strengthening the content, the reviewers recommend: a) summarizing some of the extensive data of the literature via tables, charts or other graphics, and b) Adding a schematic or other graphic which visually illustrates the relationships between the goals, strategies, and expected outcomes of the initiative, as well as the principle means of governance, relations of partners, etc.

The ECOP/SPC supports the proposed initiative. However, the writing team should address the concerns noted above and resubmit the proposal for a second review. Based on the success of the second review, ECOP/SPC will then submit the proposal to ECOP for consideration at in August 2000 meeting in Denver, Colorado.

To maintain momentum for the initiative and to set in place an approval timeline, the revised proposal should be received by ECOP/SPC on or before July 14, 2000. The proposal should be submitted in electronic format to George Cooper (gcooper@reeusda.gov) and Jon Ort (jon_ort@ncsu.edu).

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